



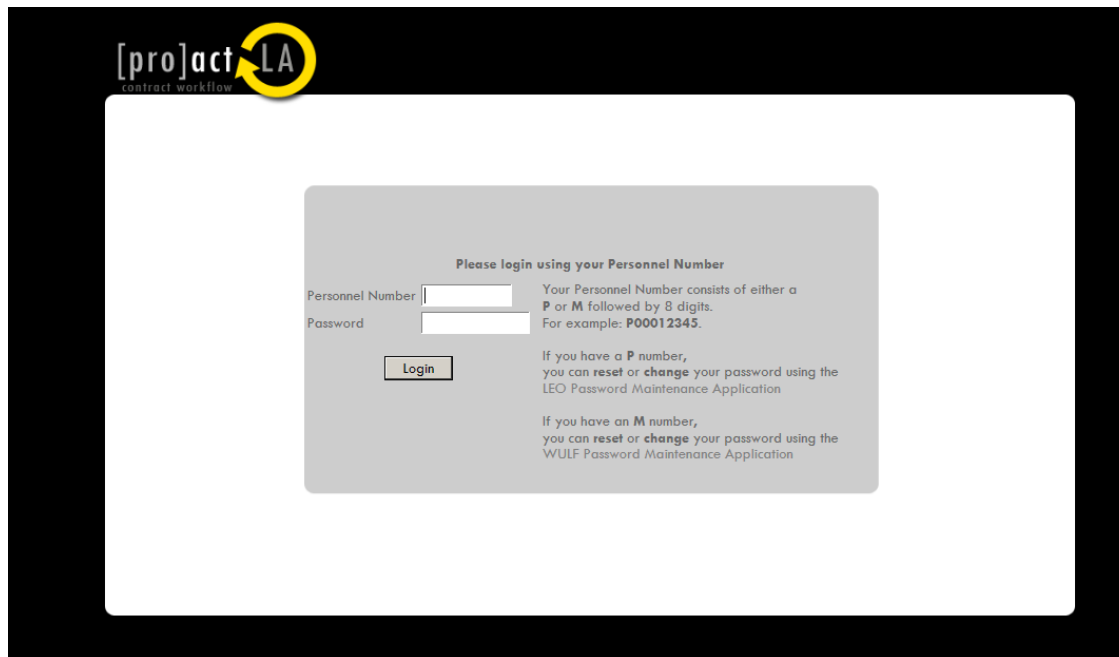
PROACT USER GUIDE

ISIS Agencies

USER LOGIN

- **Agency Requisitioner** - If you are an Agency Requisitioner (with access to create requisitions in ISIS), you will have access to enter/modify procurement transmittals for your Organizational Unit(s). Prior to using PROACT, your PROACT Agency Administrator will need to set up your ID with appropriate permissions.
- **End User** – If you are an End User and are only using PROACT to create procurement transmittals and attach required documentation, you will only have access to procurement transmittals created with your ID.

The log-in screen will appear as shown below. Follow instructions on the screen to login using your LaGov Personnel Number (same ID used to enter LEO).



[pro]act LA
contract workflow

Please login using your Personnel Number

Personnel Number

Password

Login

Your Personnel Number consists of either a **P** or **M** followed by 8 digits.
For example: **P00012345**.

If you have a **P** number,
you can **reset** or **change** your password using the
LEO Password Maintenance Application

If you have an **M** number,
you can **reset** or **change** your password using the
WULF Password Maintenance Application

HOME SCREEN

The screenshot shows the PROACT LA Home Screen. At the top left is the [pro]act LA logo with the tagline 'contract workflow'. At the top right, it says 'Welcome DPS User' and 'Department of Public Safety'. Below this are links for 'home' and 'logout'. The main heading is 'Procurement Requests'. Below the heading are three input fields: 'Transmittal', 'Requisition', and 'Description Keyword', followed by a 'Search' button. A red arrow points to a dropdown menu labeled 'Created'. Below the dropdown is a table with the following data:

Transmittal #	Requisition/Order #	Description	Agency	Date
29	1321234	Promotional Items	Department of Public Safety	6/9/14
37		microscope	Department of Public Safety	7/9/14

Below the table are several status categories with expandable arrows: Submitted to OSP, Assigned to Buyer, Returned to Agency for Additional Info, Ready to Work, Rejected, and Awarded. At the bottom left, there is a link '[+] Add New Request'.

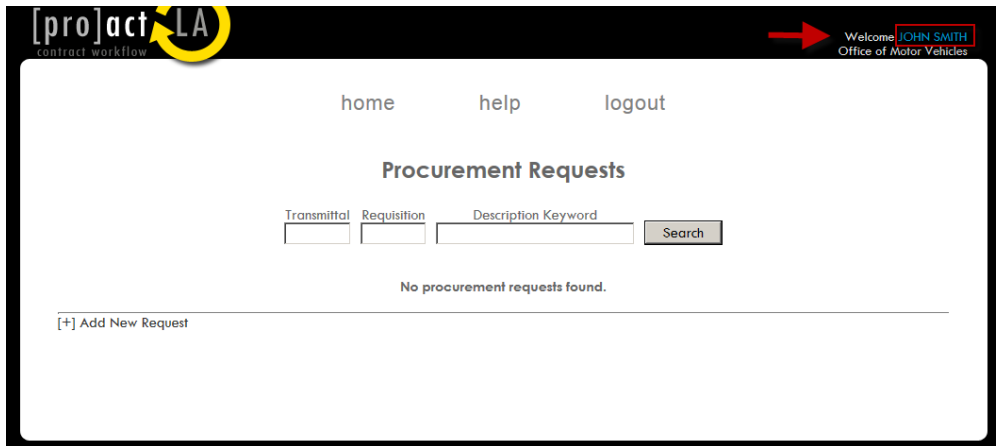
The Home screen displays procurement requests by status:

- **Created** – Requests in progress and saved by agency or end user, but not yet submitted to OSP.
- **Submitted to OSP** – Request with applicable documentation that has been submitted to OSP for initial review and possible further processing.
- **Assigned to Buyer** – Requests that have been assigned to OSP buyer and are under detailed review.
- **Ready to Work** – Requests that OSP has determined to be ready for further processing. After review, the buyer has determined that all necessary documentation has been received and OSP detailed review and processing in progress.
- **Returned to Agency** – Requests that have been returned to the agency for additional information or clarification. If an agency fails to respond to the returned document within two weeks the request will be rejected resulting in a new request being required.
- **Rejected** – Requests that have been marked as rejected have expired. After a request is returned to the agency, State Procurement allows a two week turnaround time for the requested information to be provided and resubmitted to OSP. Rejected requests must be cancelled in ISIS and recreated. The previous number may not be reused once it has been cancelled but should be referenced with resubmitted new request.
- **Awarded** - When the PO has been issued, OSP will scan and attach the printout of the PO and status will be changed to Awarded. Email notification will be sent to requester to inform that the PO is now available in PROACT for printing at the Agency.
- **Cancelled** – Requests that have been cancelled.

Clicking on the down arrow next to each status will expand the area to display requests at the selected status.

EDITING USER PROFILE

It is very important that User Profile information is correct in PROACT. This information will be used for email notifications as well as contact by phone if necessary to discuss the status of a request.



[pro]act LA
contract workflow

Welcome **JOHN SMITH**
Office of Motor Vehicles

home help logout

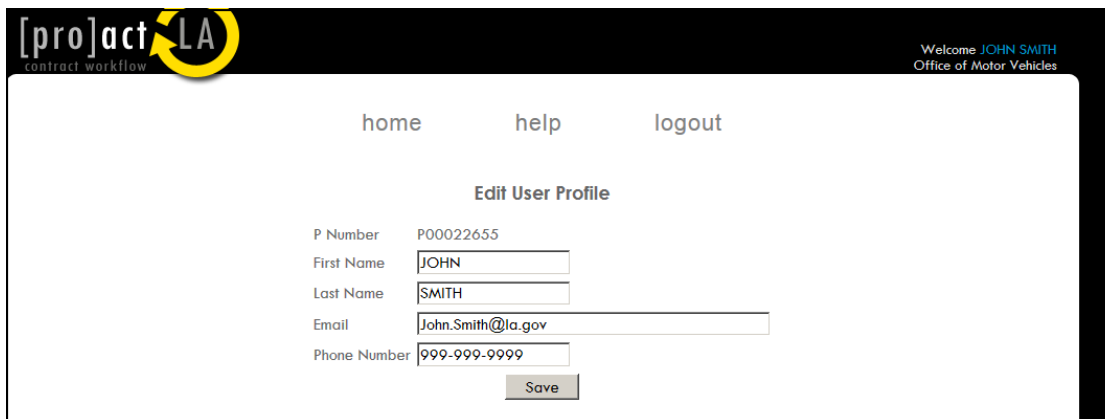
Procurement Requests

Transmittal Requisition Description Keyword Search

No procurement requests found.

[+] Add New Request

To modify contact information, click on the link containing your name, and the Edit User Profile screen will appear.



[pro]act LA
contract workflow

Welcome **JOHN SMITH**
Office of Motor Vehicles

home help logout

Edit User Profile

P Number P00022655

First Name JOHN

Last Name SMITH

Email John.Smith@la.gov

Phone Number 999-999-9999

Save

Edit contact information and Save.

CREATING A NEW REQUEST

[pro]actLA

contract workflow

Welcome DPS User
Department of Public Safety

[home](#) [logout](#)

Procurement Requests

Transmittal

Requisition

Description Keyword

Search

▼ Created

Transmittal #	Requisition/Order #	Description	Agency	Date
29	1321234	Promotional Items	Department of Public Safety	6/9/14
37		microscope	Department of Public Safety	7/9/14

▶ Submitted to OSP

▶ Assigned to Buyer

▶ Returned to Agency for Additional Info

▶ Ready to Work

▶ Rejected

▶ Awarded

[➔ \[+\] Add New Request](#)

Click on the [+] Add New Request link.

The Procurement Documentation Submittal screen will display. Enter applicable information.

[pro]act LA
contract workflow

Welcome, Susie DCFSSISEnterer
Office for Children and Family Services

home help logout

Procurement Documentation Submittal

Date: Thursday, September 25, 2014
 From: Susie DCFSSISEnterer [Office for Children and Family Services]
 Contact Information: 555-555-5555 | Anna.Magazine@la.gov
 Org Unit: Choose an Org Unit...
 ISIS Number: Resubmittal: ☐ Previous Number:
 Brief Description: 30 Characters Remaining

Special Conditions:

<input type="checkbox"/> Sole Source Purchase	<input type="checkbox"/> Proprietary Purchase Documentation
<input type="checkbox"/> Authorized Dealer Repair or Parts	<input type="checkbox"/> Renewal
<input type="checkbox"/> Change Order	<input type="checkbox"/> Exempt per Small Purchase Executive Order
<input type="checkbox"/> RFP	<input type="checkbox"/> Vehicles
<input type="checkbox"/> Labor & Materials Project	

Purchases exceeding \$5,000
 Cost estimate (if available) from recommended vendor to include the name, address, and contact information

File Upload

Detailed specifications

File Upload

Other Attachments

Description File Upload

Save

- **Date** – Creation Date is the default. The system will automatically insert this date.
- **From** – Department generating the request based on the personnel number of the employee entering the request.
- **Contact Information** - Contact Information of the person that submitted the request to OSP (based upon login ID of person submitting to OSP).
- **LaGov/ISIS Number** - ISIS (requisition, solicitation or PO number) or LaGov (RFx or Shopping Cart number) reference number. Submitter should check this number carefully to make sure it matches with the ISIS or LaGov number.
- **Brief Description** – 30 character short description
- **Current Status** – Displays current status. Click on [View History] for historical dates/times of workflow statuses.
- **Resubmittal** – Click this checkbox if this is a new procurement document submittal that is following a rejected request.
- **Previous Number** – If this is a Resubmittal, select the previously rejected requisition, PO, solicitation, RFX or shopping cart number for reference.
- **Estimated Purchase Amount** – Select one of the two amount options that apply. If the purchase is less than \$5,000 it can be made without the use of PROACT.
- **Special Conditions** – If any of these checkboxes are selected, the submittal form will expand to request additional supporting documentation (see [Procurement Handbook](#) for information). If this documentation is not provided, the Office of State Procurement will return to the Agency for additional information.

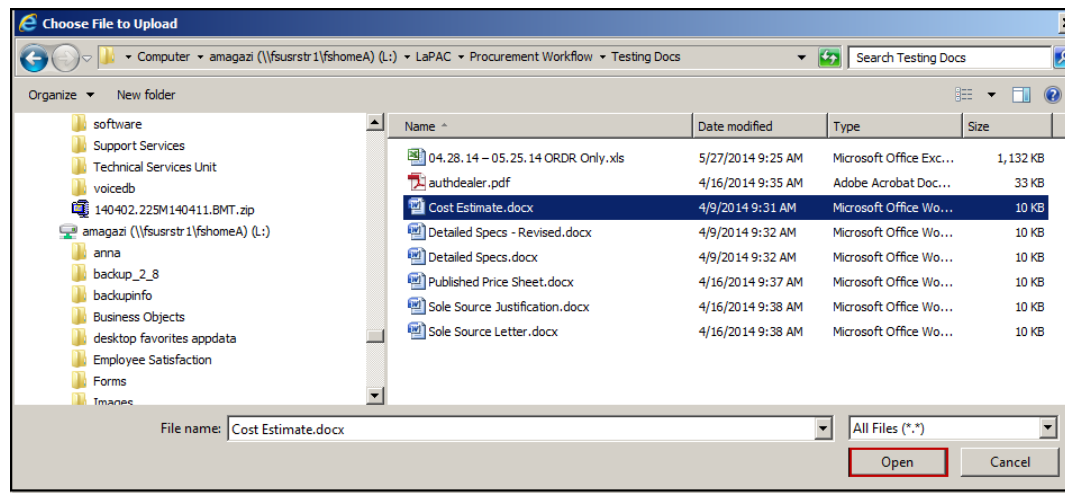
SUPPORTING DOCUMENTATION

Select any Special Conditions that apply to your request (if applicable). Provide attachments of information requested. If this information is not provided, the request will be returned to the Agency.

Example:

Special Conditions:	
<input type="checkbox"/> Sole Source Purchase	<input checked="" type="checkbox"/> Proprietary Purchase Documentation
<input type="checkbox"/> Authorized Dealer Repair or Parts	<input type="checkbox"/> Renewal
<input type="checkbox"/> Change Order	<input type="checkbox"/> Exempt per Small Purchase Executive Order
<input type="checkbox"/> RFP	<input type="checkbox"/> Vehicles
<input type="checkbox"/> Labor & Materials Project	
Purchases exceeding \$5,000	
Cost estimate (if available) from recommended vendor to include the name, address, and contact information	<input type="button" value="Browse..."/>
File	Uploaded
--	--
Proprietary Purchase Documentation	
Proprietary justification letter from Agency Head of designee	<input type="button" value="Browse..."/>
File	Uploaded
--	--
Other Attachments	
Description	<input type="button" value="Browse..."/>
File	Uploaded
--	--

To attach supporting documentation, click on the **Browse** button.



Select file and click **Open**.

The screenshot shows the PROACT web application interface. At the top left is the [pro]act LA logo with the tagline 'contract workflow'. At the top right, it says 'Welcome Thomas Pounds Administration'. Below the logo are navigation links: 'home', 'help', and 'logout'. A tabbed interface shows 'submittal', 'checklist', 'comments', and 'history'. The main content area is titled 'Procurement Documentation Submittal [Transmittal# 101]'. It contains a form with the following fields: 'Date' (Monday, September 29, 2014), 'From' (Corrections ISIS User [DOC - Administration]), 'Contact Information' (985-661-6405 | tpounds@corrections.state.la.us), 'Org Unit' (50010271 - LEGAL SECTION), 'ISIS Number' (300007), 'Resubmittal' (checkbox), 'Previous Number' (--), 'Brief Description' (Electrical Equip and Supplies), and 'Current Status' (Created). Below these are 'Special Conditions' with checkboxes for Sole Source Purchase, Authorized Dealer Repair or Parts, Change Order, RFP, Labor & Materials Project, Proprietary Purchase Documentation, Renewal/Repurchase, Exempt per Small Purchase Executive Order, and Vehicles. There are two sections for 'Purchases exceeding \$5,000', each with a 'File' input, an 'Uploaded' timestamp (9/29/14 7:58:18 AM), and a 'Browse...' button. The 'Other Attachments' section has a 'Description' input and a 'Browse...' button. At the bottom are three buttons: 'Save', 'Save & Submit to OSP', and 'Delete'.

After all required documentation has been entered into PROACT, the request can be saved. If an ISIS Number exists, the request can be submitted to OSP.

Important Note: PROACT provides information related to all supporting documentation that needs to be included in the request. It is acceptable to provide all information in one attachment if necessary.

- **Save** – will save any information. After saving the submittal, it will remain in Created status until submitted to OSP.
- **Save and Submit to OSP** – will submit the request to OSP for review. In order to submit to OSP, an ISIS or LaGov requisition, PO, solicitation, RFx or Shopping Cart number must be assigned, description entered, and Estimated Purchase Amount must be selected. When this action is performed, the request will move to Submitted to OSP status and can no longer be edited by the Agency.
- **Delete** – This option is only available prior to a request being submitted to OSP.

SUBMITTED TO OSP

To view requests submitted to OSP, go to Home page and click on the arrow to expand the area under that status.

The screenshot shows the [pro]act LA contract workflow interface. At the top, there is a navigation bar with the logo and a welcome message for a DPS User. Below the navigation bar, there are links for 'home' and 'logout'. The main heading is 'Procurement Requests'. Below this, there is a search bar with fields for 'Transmittal', 'Requisition', and 'Description Keyword', and a 'Search' button. A red arrow points to the 'Submitted to OSP' status, which is expanded. This status shows a table of procurement requests with columns for Transmittal #, Requisition/Order #, Description, Agency, and Date. The table lists 12 records, showing details for various items like tires, police supplies, bullets, uniforms, tractor parts, and promotional items. At the bottom of the table, it says 'Showing 1 to 10 of 12 records'.

home logout

Procurement Requests

Transmittal Requisition Description Keyword Search

Created

Submitted to OSP

Search:

Transmittal #	Requisition/Order #	Description	Agency	Date
21	1351260	tires	Department of Public Safety	6/4/14
22	1354697		Department of Public Safety	6/4/14
23	1352145	Police supplies	Department of Public Safety	6/9/14
24	1390001	bullets	Department of Public Safety	6/5/14
25	1390002	uniforms	Department of Public Safety	6/5/14
26	1354600	1131313131313	Department of Public Safety	6/9/14
27	1354601	Tractor parts	Department of Public Safety	6/10/14
28	1394600	Promotional Items	Department of Public Safety	6/9/14
31	1352456	Security Services	Department of Public Safety	6/10/14
34	1358825	Testing from tina	Department of Public Safety	6/10/14

Showing 1 to 10 of 12 records

Assigned to Buyer

Returned to Agency for Additional Info

Ready to Work

If the request has not yet been assigned to a buyer, it will display under this status. Select a request to review, and the Procurement Documentation Submittal screen will display.

Submittal Tab

This tab contains the information submitted by the Agency.

[pro]actLA
contract workflow

Welcome Susie DCFSSISSEnter
Office of Children and Family
Services

homehelplogout

submittalchecklistcommentshistory

Procurement Documentation Submittal [Transmittal# 73]

Request submitted to OSP for review by Susie DCFSSISSEnter on Thursday, September 25, 2014 at 1:43:49 PM.

Assigned To: Not Assigned

Date:Thursday, September 25, 2014

From:Susie DCFSSISSEnter [DCFS - Office of Children and Family Services]

Contact Information:555-555-5555 | Anna.Magazine@la.gov

Org Unit:50010619 - MANAGEMENT AND FINANCE DIVISIO

ISIS Number:3092501 | Resubmittal: Previous Number: --

Brief Description:Office Supplies

Current Status:Submitted to OSP

Special Conditions:

☐ Sole Source Purchase

☐ Authorized Dealer Repair or Parts

☐ Change Order

☐ RFP

☐ Labor & Materials Project

☐ Proprietary Purchase Documentation

☐ Renewal/Repurchase

☐ Exempt per Small Purchase Executive Order

☐ Vehicles

Purchases exceeding \$5,000

Cost estimate (if available) from recommended vendor to include the name, address, and contact information

File

Cost Estimate.docx

9/25/14 1:43:13 PM (Susie DCFSSISSEnter)

Detailed specifications

File

Detailed Specifications.docx

9/25/14 1:43:13 PM (Susie DCFSSISSEnter)

Other Attachments

Description

Other attachment

File

Test Attachment.docx

Uploaded

9/25/14 1:43:13 PM (Susie DCFSSISSEnter)

10

Checklist Tab

This tab contains the Procurement Documentation Checklist maintained by the Office of State Procurement. If a request is submitted with incomplete documentation, it will be Returned to the Agency by OSP. This checklist will provide details pertaining to the information that is incomplete.

The screenshot displays the [pro]act LA contract workflow interface. At the top, there is a navigation bar with links for 'home', 'help', and 'logout'. Below this, a tabbed interface shows 'submittal', 'checklist' (highlighted with a red border), 'comments', and 'history'. The main content area is titled 'Procurement Documentation Checklist [Transmittal# 73]'. It contains a header section with fields for Date, To, From, Subject, ISIS Number, and Buyer. Below this, a 'Current Status' section indicates the requisition was submitted to OSP. A bolded paragraph states that the supporting documentation is incomplete and requires immediate attention, with a 2-week deadline for submission. A list of required documents follows, each with a checkbox: Signed and dated quote, Detailed specifications, Sole Source Documentation (Firm, fixed price quote, Published price sheet, Sole source letter, Sole source justification letter), Proprietary Purchase Documentation (Proprietary justification letter), Authorized Dealer Repair or Parts (Firm, fixed price quote, Authorized Dealer form), Renewal (Previous P.O., Other), and OSP Attachments (No OSP Uploads).

[pro]act LA
contract workflow

Welcome [Susie DCFISISEnterer](#)
Office of Children and Family
Services

home help logout

submittal **checklist** comments history

Procurement Documentation Checklist [Transmittal# 73]

Date: Thursday, September 25, 2014
To: Susie DCFISISEnterer [Anna.Magazine@la.gov | 555-555-5555]
From: Office of State Purchasing
Subject: Incomplete Documentation
ISIS Number: 3092501
Buyer: --

Current Status: Submitted to OSP

The supporting documentation for the requisition listed above is incomplete and requires your immediate attention.
Please submit the documentation required below within 2 weeks of receiving this request. If documentation is not received within 2 weeks, the requisition will be rejected. Once rejected, the requisition may not be resubmitted. A new requisition/approval process is required upon resubmittal.

- ☐ Signed and dated quote from the suggested vendor reflecting a firm, fixed price.
- ☐ Detailed specifications.
- Sole Source Documentation**
 - ☐ Firm, fixed price quote
 - ☐ Published price sheet from the vendor
 - ☐ Sole source letter from vendor indicating the unique feature(s) of the product and the fact that there are no distributors for the product
 - ☐ Sole source justification letter from Agency Head or designee
- Proprietary Purchase Documentation**
 - ☐ Proprietary justification letter from Agency Head or designee
- Authorized Dealer Repair or Parts**
 - ☐ Firm, fixed price quote
 - ☐ Authorized Dealer form
- Renewal**
 - ☐ Previous P.O.
 - ☐ Other

OSP Attachments
No OSP Uploads

Comments Tab

This tab serves as a means of communication between the Agency and the Office of State Procurement. Any important information that needs to be communicated should be entered into PROACT. It is preferred that communication is posted into the PROACT system rather than email for future reference purposes.

IMPORTANT NOTE: Comments cannot be edited or deleted after the Post Comment button is selected.

The screenshot shows the PROACT LA web application interface. At the top left is the [pro]act LA logo with the tagline 'contract workflow'. At the top right, a welcome message reads: 'Welcome Susie DCFSISISEnterer, Office of Children and Family Services'. Below the logo, there are navigation links: 'home', 'help', and 'logout'. A horizontal menu contains four tabs: 'submittal', 'checklist', 'comments' (which is highlighted with a red border), and 'history'. The main content area is titled 'Comments [Transmittal# 73]'. It features a table with the following data:

Comment	Posted By	Posted On
Spoke to Mary Smith at OSP on 9/25.	Susie DCFSISISEnterer	9/25/14 4:06:46 PM

Below the table, there is a text input field labeled 'Add a comment:'. At the bottom of the form are two buttons: 'Post Comment' and 'Post Comment and Send Email'.

- **Post Comment** – will post comment without sending email notification.
- **Post Comment and Send Email** – If comment is entered by Agency personnel, email will be sent to OSP personnel to notify that a comment has been entered into PROACT for the transmittal. If the comment is entered by OSP personnel, email will be sent to the requestor using email address in User Profile.

History Tab

This tab contains information related to the different statuses of the request.

These statuses and historical dates/times will be used for Upper Management's reporting purposes to track the efficiency of procurement processes.

The screenshot shows the [pro]act LA contract workflow interface. At the top left is the logo with the text "[pro]act LA contract workflow". At the top right, it says "Welcome DPS User" and "Department of Public Safety". Below the logo, there are links for "home" and "logout". A navigation bar contains four tabs: "submittal", "checklist", "comments", and "history", with "history" highlighted by a red border. Below the tabs, the title "Requisition: 1352145 [Department of Public Safety]" is displayed. A table shows the history of actions:

Action	Assigned To	Logged By	Date
Created	--	Tara Pocorello	6/4/2014 11:47:01 AM
Submitted to OSP	--	Tara Pocorello	6/9/2014 8:50:46 AM

ASSIGNED TO BUYER

After initial review to ensure that supporting documentation is included with a procurement request, the request will be assigned to a buyer in the Office of State Procurement and status will be changed to Assigned to Buyer.

RETURNED TO AGENCY FOR ADDITIONAL INFO

It is important to ensure that any requests that have been Returned to Agency for Additional Information are handled in a timely manner.

The screenshot shows the [pro]act LA contract workflow interface. At the top, there is a navigation bar with 'home' and 'logout' links. Below this is a section titled 'Procurement Requests'. There are three input fields for 'Transmittal', 'Requisition', and 'Description Keyword', followed by a 'Search' button. A sidebar on the left contains a list of status tabs: 'Created', 'Submitted to OSP', 'Assigned to Buyer', and 'Returned to Agency for Additional Info'. A red arrow points to the 'Returned to Agency for Additional Info' tab. Below the tabs is a table with the following data:

Transmittal #	Requisition/Order #	Description	Agency	Assigned To
18	1351251	badges	Department of Public Safety	Hilary Stephens
10	1351252	Alarm Service	Department of Public Safety	Hilary Stephens

Open the returned request and the Procurement Documentation Submittal screen will display. Review all tabs of information and edit request to include the additional information. When all edits are complete, click the Save & Submit to OSP button to resubmit. If the request has been assigned to a buyer, the status of the request will be updated to Submitted to OSP and the assigned buyer at the Office of State Procurement will receive notification that the request is available for further review.

READY TO WORK

Requests that OSP has determined to be complete and ready for processing will be set to Ready to Work status.

REJECTED

Requests that have been marked as rejected have expired. After a request is returned to the agency, State Procurement allows a two week turnaround time for the requested information to be provided and resubmitted to OSP. Rejected requests must be cancelled in ISIS and recreated. The previous number may not be reused once it has been cancelled but should be referenced when submitting new request.

AWARDED

When the PO has been issued, OSP will scan and attach the printout of the PO and status will be changed to Awarded. Email notification will be sent to requester to inform that the PO is now available in PROACT for printing at the Agency.

CANCELLED

Requests that have been cancelled.